

## Upload Attachments

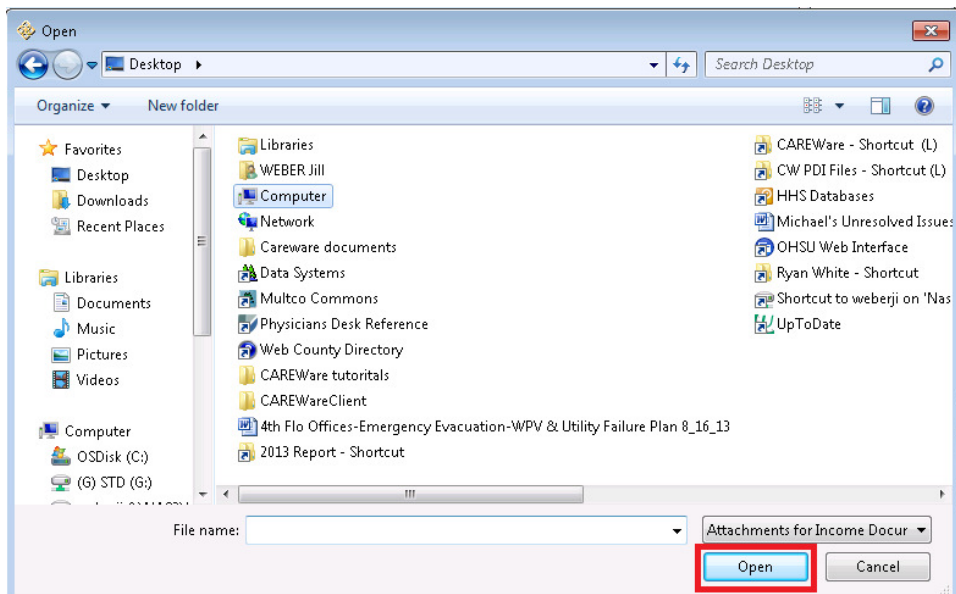
1. Click Find client to open client record for which the attachment belongs
2. Click on the blue hyperlink field to which the attachment needs to be stored

The screenshot shows a client record form with tabs for Demographics, Service, Annual Review, Encounters, Referrals, Relations, Part A Eligibility, and Client Info. The 'Part A Eligibility' tab is active. It contains a dropdown for 'Part A Eligibility Determination Status' set to 'In process' and a text field for 'At most recent determination' with the value 'Client signed a "no change" form'. Below these are two red-bordered boxes containing blue hyperlinks: 'Link to Additional Eligibility Information' and 'Residency Documentation' on the left, and 'Income Documentation' and 'Insurance Documentation' on the right.

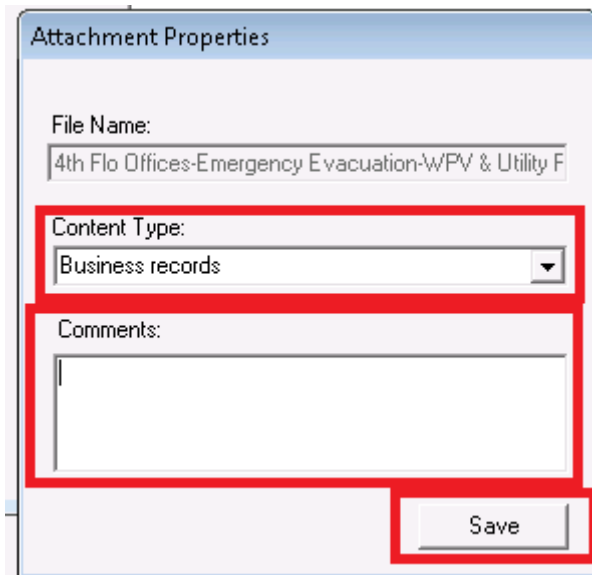
3. Click F1 – Attach New File(s)

The screenshot shows the 'Attachment List Manager' window. On the left, a list of actions includes 'F1 - Attach New File(s)' (highlighted with a red box), 'F2 - Edit Content Description(s)', 'F3 - Delete Attachment(s)', 'F4 - View Attachment(s)', and 'ESC - Close'. The main area displays a table with columns: Content, Attach..., Attach User, Mod Date, Mod User, and File Type. A single row is visible with the content 'Zero Income...', attach date '07/31/2014', user 'MEAVES', mod date '7/31/2014', user 'MEAVES', and file type '.pdf'.

4. Find the location of file on your compute
5. Click Open

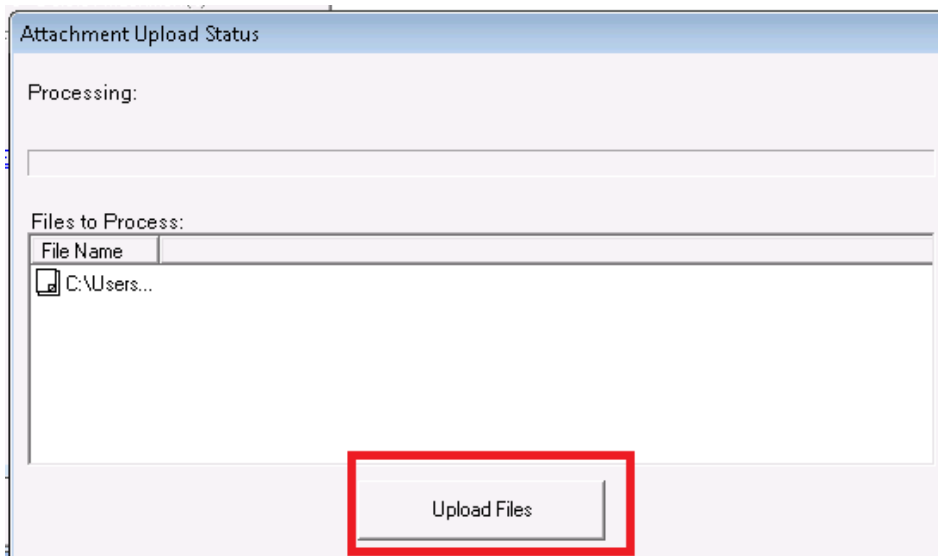


6. Populate the Content Type using the dropdown menu
  - a. Each fields has its own customized list
7. Add a Comment if needed
8. Click Save




The image shows a dialog box titled "Attachment Properties". It contains three main sections: "File Name:" with a text field containing "4th Flo Offices-Emergency Evacuation-W/PV & Utility F"; "Content Type:" with a dropdown menu showing "Business records"; and "Comments:" with a large text area. A "Save" button is located at the bottom right. Red rectangular boxes highlight the "Content Type" dropdown, the "Comments" text area, and the "Save" button.

9. Click Upload Files
10. Document will automatically upload



The image shows a dialog box titled "Attachment Upload Status". It has a "Processing:" section with a progress bar. Below that is a "Files to Process:" section with a table. The table has a header row with "File Name" and a data row with a folder icon and "C:\Users...". A red rectangular box highlights the "Upload Files" button at the bottom right.

File Name
 C:\Users...

## 11. Confirm the document appears in history list

